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Wealthtech Weekly

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By Rob Burgess
Reporter

Many factors have experts worried that a bubble in artificial intelligence could be forming. Here's how advisors can position client portfolios to ensure they are prepared.

Also, this week:

- Older and wealthier clients remain wary of AI. Here's how to build trust.
- Here's how advisors can better serve neurodivergent clients.
- The FPA plans to refresh advisor search for the AI age with Snappy Kraken.

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INVESTMENT STRATEGIES

If AI is a bubble, how can advisors prepare?

An increasing number of warning signs point to a potential dot-com-level correction. So, how can advisors adjust client portfolios now?

- **Older, wealthier clients remain wary of AI. Here's how to build trust**
  A new report from Cerulli Associates shows older, affluent investors are far more skeptical of AI use than their younger counterparts. Financial advisors who use AI tools in their practices say transparency is key to setting wary clients at ease.
- **How advisors can better serve neurodivergent clients**
  From reducing cognitive load to rethinking meeting formats, small changes can lead to big improvements for some clients.
- **FPA to refresh advisor search for AI age with Snappy Kraken**
  The revamped platform will be available by late summer and feature several upgrades, including a greater ability to be discovered by artificial intelligence search results.

- **Record scratch? Advisors on investing in vintage vinyl**
  Given recent renewed interest in the medium, top enthusiasts' collections can be worth six figures. But quality generally beats quantity, and it pays to be informed about which rare pressings are most sought-after.

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